Portal user guide – Update client details

Clients' details may be updated in the portal as required, this can include personal information, communication preferences and if they have passed away.

Access

What access do I need?

SP Site or SP Claims

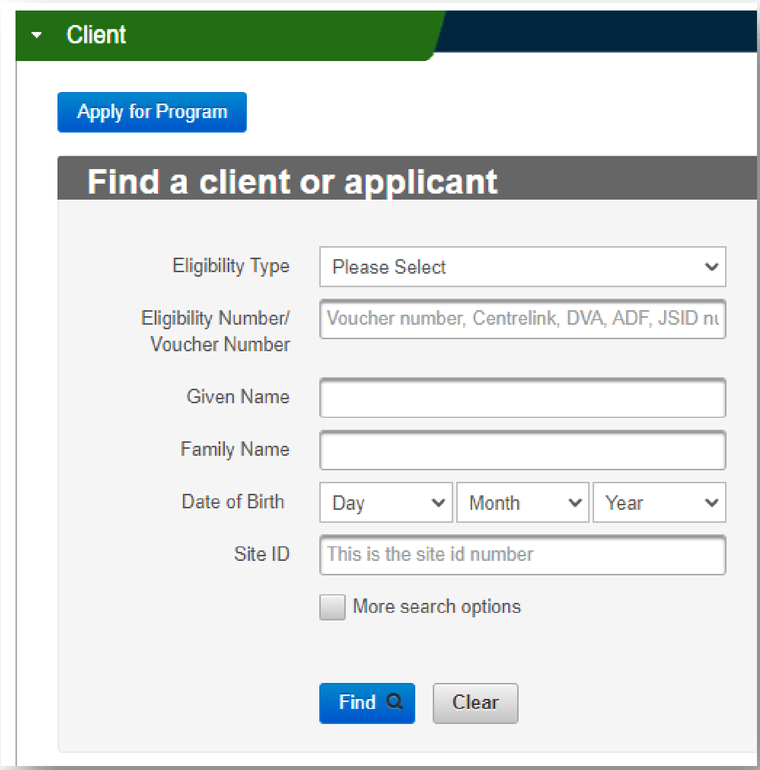
What else do I need?

You must be linked to the client in the portal.

Client details

Step 1

From the landing page of the portal, open the Client tab and search for the client.

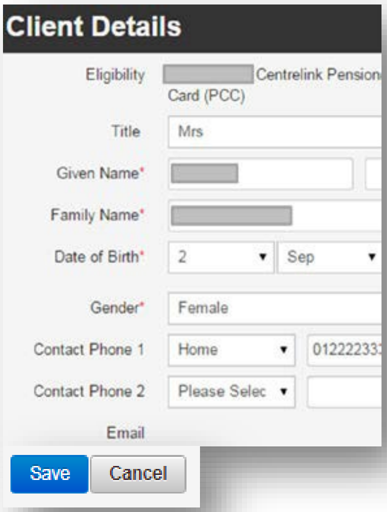


Opening the client's page will bring up the client details screen.

Step 2

The client's current details are at the top of the screen. Click **Edit** to update any of the following client's details

- Name
- Date of birth
- Gender
- Title
- Contact number
- Address
- Specialist services (please see the '[update a client to specialist services](#)' guide)



If you have updated the client's address you will need to click **Check address** and confirm the correct address.

Click **Save**.

Updating communication preferences

Step 1

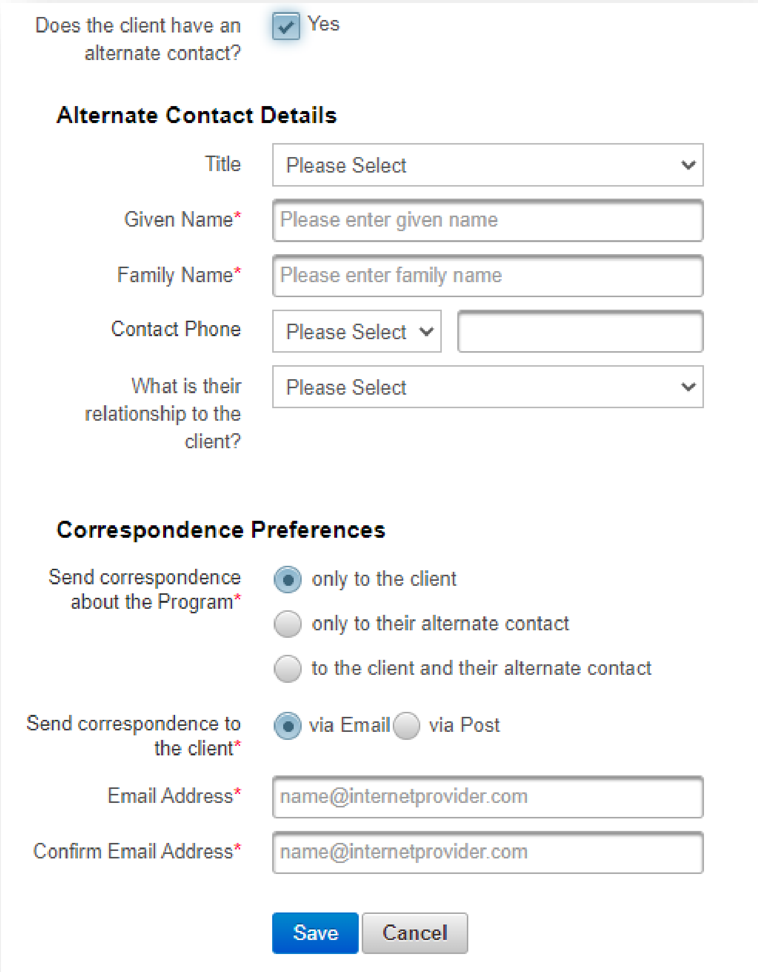
Under the Client Communications tab, Click **Edit** to update any of the following details:

- mark if the client lives in an aged care facility
- add an alternative contact
- update the client's correspondence preferences
- add an email address

Step 2

If your client would like to nominate an alternative contact, please check the box next to 'Does the client have an alternative contact'. You will need to enter in the alternative contact's details.

You can choose whether to send information to the client only, the alternate contact only, or to both.



Does the client have an alternate contact? Yes

Alternate Contact Details

Title: Please Select

Given Name*: Please enter given name

Family Name*: Please enter family name

Contact Phone: Please Select

What is their relationship to the client?: Please Select

Correspondence Preferences

Send correspondence about the Program*:
- only to the client
- only to their alternate contact
- to the client and their alternate contact

Send correspondence to the client*: via Email / via Post

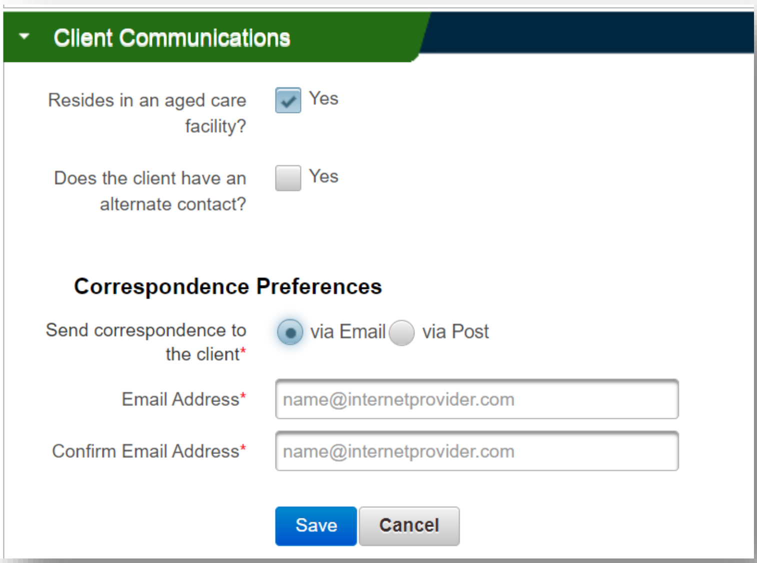
Email Address*: name@internetprovider.com

Confirm Email Address*: name@internetprovider.com

Save | Cancel

Step 3

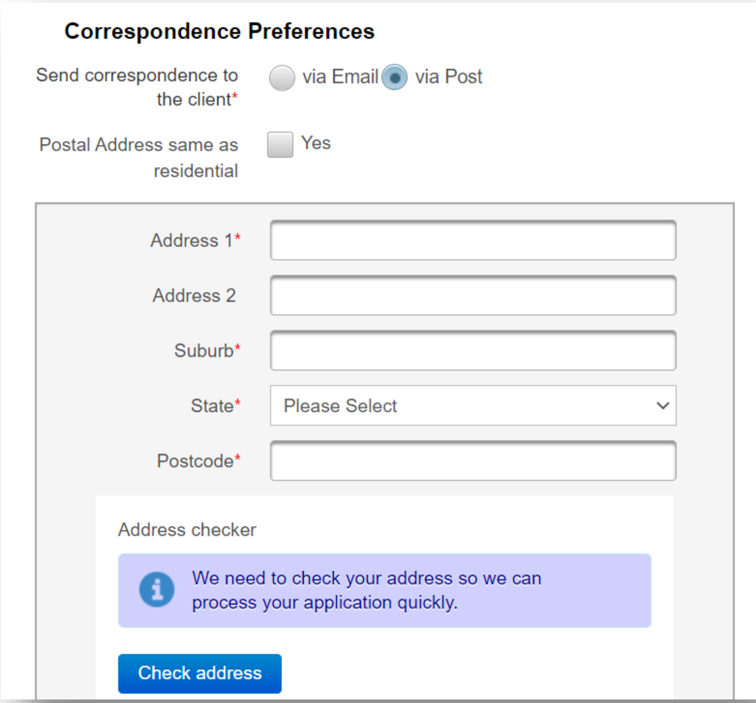
You can also add an email address for the client by selecting Send correspondence to the client to via Email.



Step 4

If the client prefers correspondence by post, you can also specify a different postal address for the client, if relevant. To do so, untick the Postal Address same as residential box and fill in the details. Click **Check address** and confirm the correct address.

Click **Save**.



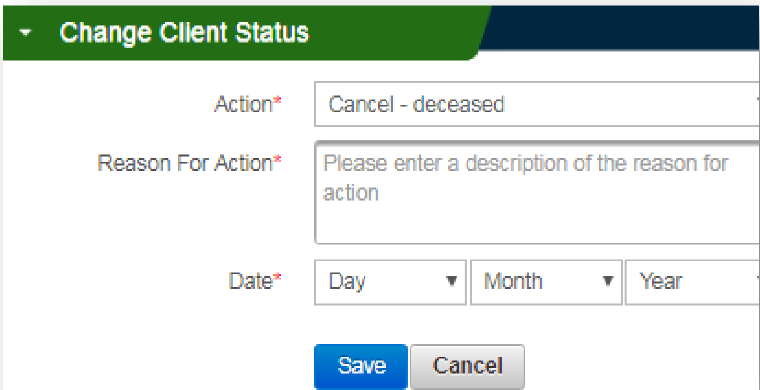
Deceased clients

Step 1

If your client has passed away, you need to update the portal.

Open the Change Client Status tab.

Click **Edit**, and in the drop down Action menu choose ‘Cancel– deceased’.



You will need to add a Reason For Action, such as “client’s family advised” and today’s date.

Click **Save**.